



**BEACON SAP Training**



# Advanced Create and Maintain Employee Data

## PA410




SLIDE 1

State of North Carolina  
Office of the State Controller


**Notes:**

### BEACON Training-Welcome and Introductions



Welcome to the *Advanced Create and Maintain Employee Data* course.

- Introductions
- Sign-in sheet
- Tent cards
- Restrooms
- Breaks
- Parking lots
- Classroom etiquette
  - Cell phones off
  - No side conversations



SLIDE 2

State of North Carolina  
Office of the State Controller


### Notes:

The course introduction is an opportunity to get to know the others who are attending class, as well as to agree on classroom courtesy. The Instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.

### Prerequisites

- BEACON Overview BC100
- BEACON SAP Basic Navigation BC110
- Personnel Administration Overview PA200
- Personnel Administration Terms, Concepts, and Display Data PA210
- Create and Maintain Employee Data PA310



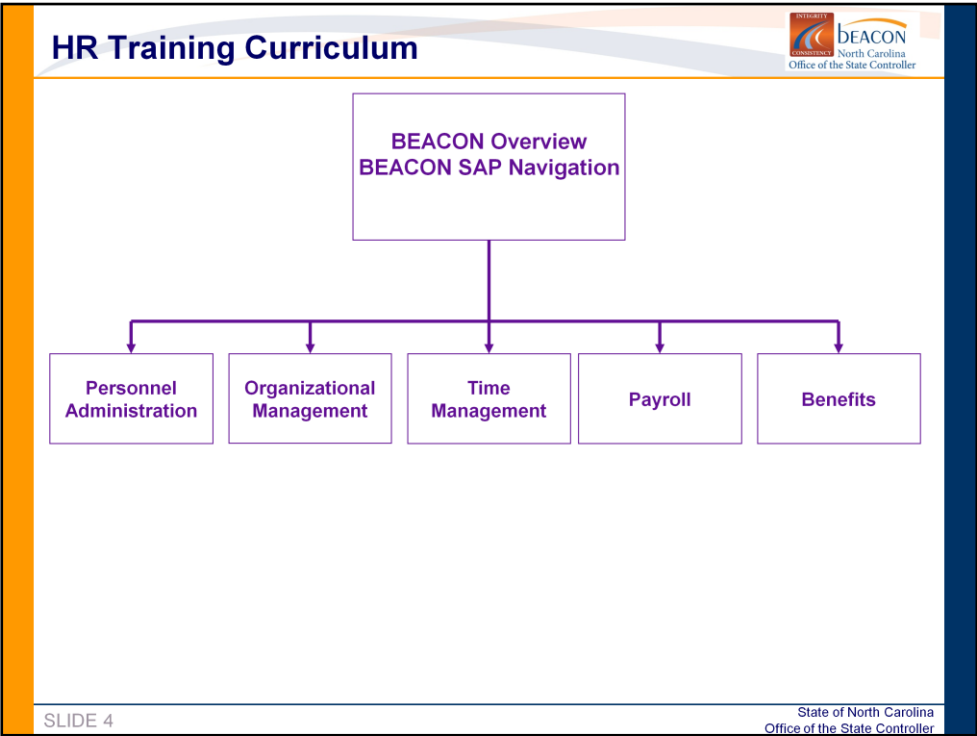
BEACON  
North Carolina  
Office of the State Controller

SLIDE 3

State of North Carolina  
Office of the State Controller

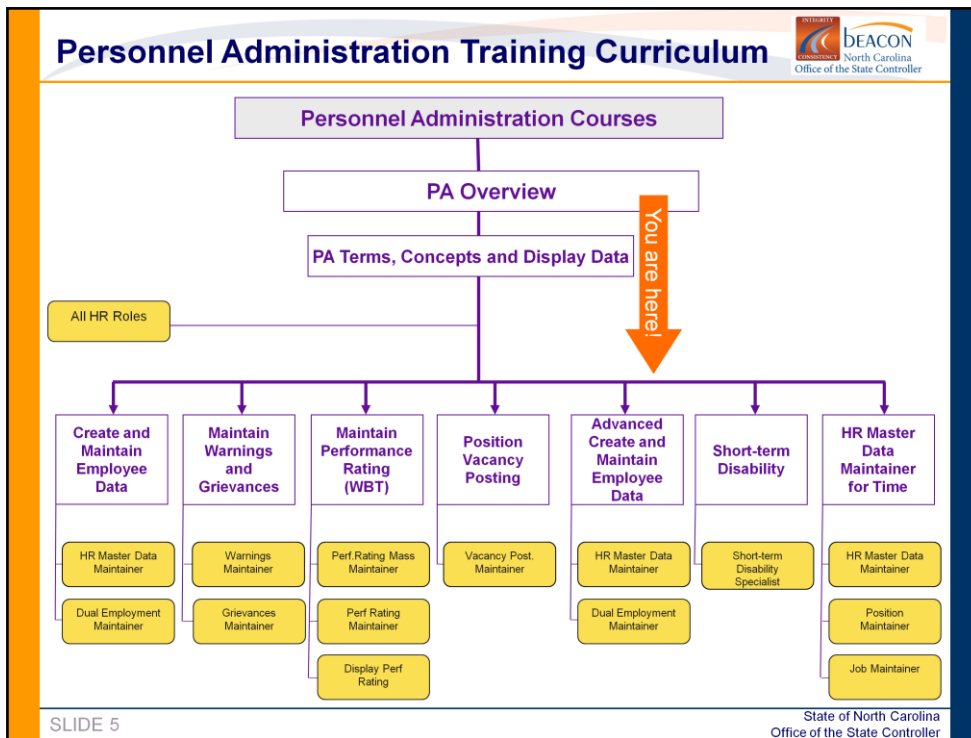
### Notes:

There are five pre-requisites that you must take before attending this course. Attending these pre-requisites ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the *Advanced Create and Maintain Employee Data* course.



**Notes:**

The BEACON HR/ Payroll training program comprises several courses and different modules. Based on your HR role you will attend courses in the Personnel Administration module.

**Notes:**

Within the Personnel Administration module, there are several courses. Everyone attends the first course, *Personnel Administration Overview*. Your position determines which additional courses you may be required to attend.

In addition to the above courses, there are several web-based courses available:

- BEACON Overview
- Basic Navigation
- Personnel Administration Overview (PA200)

Course Map

Lesson 1: Transfers

Lesson 2: Leave of Absence

Lesson 3: Additional Actions


Lesson 4: Course Review

SLIDE 6

State of North Carolina  
Office of the State Controller

Notes:

### Course Results



The following activities and exercises are associated with each lesson:

- Lesson 1: Transfers
  - Hire a former State employee who has no record in BEACON SAP
  - Transfer an employee within an agency (full security)
  - Transfer an employee from a BEACON agency to a different BEACON agency (security for only the Receiving agency)
- Lesson 2: LOA
  - Create an Action to indicate the employee is out on FMLA leave
  - Create an Action to indicate the employee is out on Military leave
  - Create an Action to indicate the employee is out on Workers' Comp leave
  - Reinstatement an employee from Workers' Comp leave


*Continued...*

SLIDE 7

State of North Carolina  
Office of the State Controller

### Notes:

## Course Results *(continued)*



- Lesson 3: Additional Actions
  - Demotion
  - Investigatory w/pay
  - Suspension
  - Cancel Salary Adjustment
  - Career Progression
  - Reallocation
  - Dual Employment
- Lesson 4: Review course materials

SLIDE 8

State of North Carolina  
Office of the State Controller


**Notes:**



### Course Objectives

Upon completion of this course, you should be able to:

- Hire an employee from a non-BEACON agency
- Transfer an employee within a BEACON agency or to a different BEACON agency
- Describe the various reasons for a Leave of Absence and determine when each is applicable to use
- Execute a Leave of Absence
- Reinstatement an employee from Leave of Absence
- Describe additional Actions associated with an employee




BEACON  
North Carolina  
Office of the State Controller

SLIDE 9

State of North Carolina  
Office of the State Controller

### Notes:

## Welcome: Strategy for Training



- Tell me**  
**Concepts**  
Your Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN
- Show me**  
**Demonstrations**  
Your Instructor will demonstrate job-related tasks performed in BEACON SAP – HANDS OFF
- Let me**  
**Exercises**  
You will complete the exercises which allow for hands-on practice in class – HANDS ON
- Support me**  
**Availability**  
Your Instructor will be available to answer questions while you complete the exercises

SLIDE 10

State of North Carolina  
Office of the State Controller


**Notes:**

The *Advanced Create and Maintain Employee Data* Student's Guide provides a copy of the PowerPoint presentation used in the classroom training. You will observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the BEACON SAP training environment.

You may also find it useful to take the Employee Self-Service and Manager Self-Service courses, although they are not required for the PA curriculum. They are, however, mandatory for other requirements.

### Reference Materials

- Student Guide
- Exercise Guide
- Job Aids
- Other resources:
  - Online Help
  - Simulations (available on select transactions)
  - Work Instructions




BEACON  
North Carolina  
Office of the State Controller

SLIDE 11

State of North Carolina  
Office of the State Controller

**Notes:**

### BEACON Online Help



- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures that you can print
- Includes links to simulations

**To access BEACON Help from any SAP screen, select the **Help > BEACON Help** menu option**

SLIDE 12

State of North Carolina  
Office of the State Controller

To access BEACON online help:

- <http://help.mybeacon.nc.gov/beaconhelp/>

### Notes:

Course Map

Lesson 1: Transfers

Lesson 2: Leave of Absence

Lesson 3: Additional Actions

Lesson 4: Course Review

SLIDE 13

State of North Carolina  
Office of the State Controller

**Notes:**


### Lesson Objectives

Upon completion of this lesson, you should be able to describe and enter the applicable data to:

- Initiate Workflow
- Transfer an employee from a University to a BEACON agency
- Transfer an employee within an agency
- Transfer an employee from one BEACON agency to a different BEACON agency

SLIDE 14

State of North Carolina  
Office of the State Controller



**Notes:**

**Notes:**

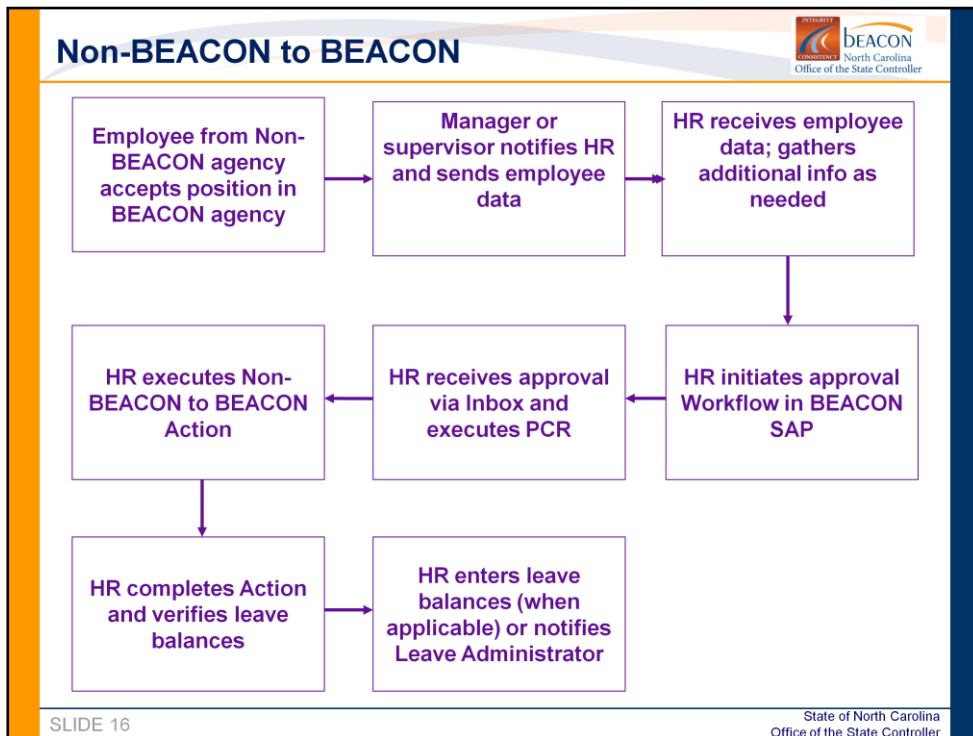
The Non-Beacon to Beacon Action is used when:

- The returning employee has a record in PMIS, but does not have a record in BEACON because he or she left State employment before his or her agency converted to BEACON. The employee may be returning to the same agency as the one he or she left (as well as to the same position), or may be going to a new agency and position. As long as the former employee has a record in PMIS, but no record in BEACON, you will use the Non-Beacon to Beacon Action. Reinstatement is only used to reinstate an employee from BEACON to BEACON.
- A University employee is leaving the university system and accepting a position with a state agency.

**Reasons associated with the Non-Beacon to Beacon Action**

- |                              |  |
|------------------------------|--|
| • Transfer Lateral           | • Return to St w/in 12 mths same S/G   |
| • Transfer Reassignment      | • Return to St w/in 12 mths higher S/G |
| • Transfer Promotion         | • Return to St w/in 12 mths lower S/G  |
| • Return to State w/in 5 yrs | • Return to State after 5 yrs          |
| • Grade-Band Transfer *      |  |

**NOTE:** If you use the Grade-Band transfer reason, on Workflow enter Pay Scale type, Pay Scale Area and Pay Scale Group before you press Enter; otherwise, you will get an error message. Of course, you can merely press Enter to bypass the error message and then enter the fields as well.

**Notes:**

As you enter the information for the employee, you will observe that the same infotypes display for the Non-Beacon to Beacon Action as display for a new hire. This is logical since there is no employee record in the agency's BEACON HR system—all of the employee's information is in his or her agency's current non-BEACON system. Therefore, you are creating a completely new HR file in BEACON SAP, including all of the applicable infotypes, (which includes enrolling the employee into the applicable Retirement System).


You should make sure that you obtain any leave balances active on the employee. You will verify the balances from the previous agency. If you have a dual role as both the HR Master Data Maintainer and the Leave Administrator, you will use PA30 to create infotype 2013 - Quota corrections for each transferring leave balance (this infotype is not presented during the Non-Beacon to Beacon Action).

If your role only consists of being the HR Master Data Maintainer, you must contact the Leave Administrator to ensure that the employee's leave balances are brought up to date.



## Instructor Demonstration

- In this demonstration, the Instructor will:
  - Assist you logging into BEACON SAP
  - Guide you into opening eAssistant online help
  - Laterally transfer Mary Poppins from a University to a BEACON agency
- **Important!** Only enter data along with the Instructor if instructed to do so. There is only enough data for students to use for exercises.



SLIDE 17

State of North Carolina  
Office of the State Controller

### Notes:

#### **Changing temporary employees to a permanent employee**

If a temporary employee accepts a permanent position, one of the following is applicable:

1. If they change position numbers it is either a Transfer or a Promotion.
2. If they do not change position numbers it is an Appointment Change. You will also modify the salary as applicable in the Appointment Change Action. Be sure to justify salary in Maintain Text. Text can be cut and pasted easily from Services for Objects to Maintain Text.

**Caution!** If the transfer moves the employee from one payroll type to another, you will only initiate the WF. When you receive the approval in your Inbox, contact BEST. You will not complete the Action, it will be completed by BEST.


### Exercise 1.1

- Non-Beacon to Beacon - Lateral

Mary Poppins, an Office Assistant IV at UNC-CH, has accepted an Office Assistant IV position at the Cultural Resources Archives and History office for a salary of \$25,750. Her current salary is \$25,750 and she is a permanent, subject to FLSA OT employee. She had 110 months of creditable service at UNC-CH. Mary was given a State ID and two office keys.

**NOTE:** If you transfer an employee from one employee type to a different employee type, you must change the Employee Subgroup.

Initiate Workflow to begin the process.



SLIDE 18

State of North Carolina  
Office of the State Controller

### Notes:

#### Logging into BEACON

The Instructor will access BEACON SAP and then assist you in logging on and accessing eAssistant. After all of the students have logged on, watch the Instructor complete the Action using the student's scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

It is important that you only enter data when instructed and only use data assigned to you; otherwise, you may be using data that has been designated for other students. This will prevent other students from being able to complete their exercises.

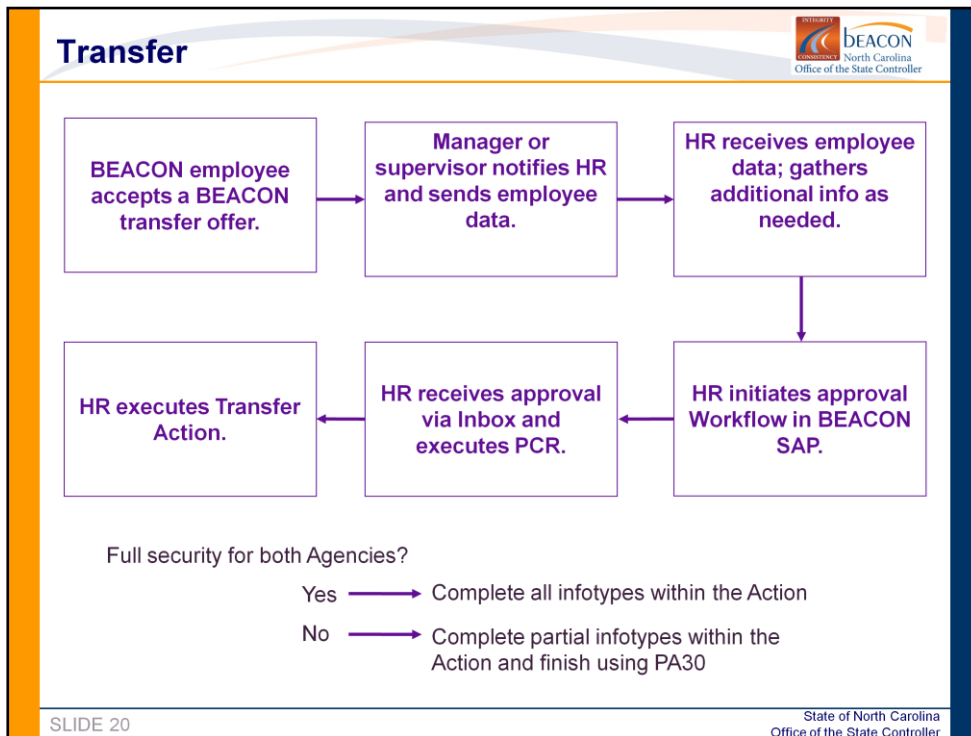
Use the data assigned in the Data Guide to complete the exercise.  
Use eAssistant for step-by-step instructions.

## Notes:

If your security access permits, you can see some of the information concerning employees in other agencies. Run the *BI Verify Employment Report (BO157)* to verify the employee's information.

### Reasons associated with the Transfer Action

- Agency to Agency – Lateral
- Agency to Agency – Promotion
- Agency to Agency – Reassignment
- Within Agency – Lateral
- Within Agency – Reassignment
- Grade-Band Transfer

**Notes:**

A Transfer Action is used to move an employee from one position to another within the present BEACON agency or between BEACON agencies without a break in service.

Normally a transfer between agencies results in an employee reporting to work in the Receiving agency the first workday following the separation date from the Leaving agency. The Leaving agency does not separate the employee in BEACON; however, the Leaving agency should delimit any items on loan that the employee returned. If the Leaving agency does not delimit the items on loan, the Receiving agency can delimit them at the time of transfer (assuming the employee actually returned the items).

**Two ways to process a Transfer in BEACON**

There is only one Transfer Action in BEACON; however, you may process transfers in one of two ways, depending upon your security access. If you have security access for:

- both the *Leaving* agency and the *Receiving* agency, BEACON SAP allows you to complete all of the infotypes during the Transfer Action.
- only the Receiving agency, BEACON SAP allows you to partially complete the Action. In the latter case, you will use PA30 to complete the infotypes.

## Exercise 1.2



- Transfer - Within agency - Lateral

Helen Stephens is an Office Assistant IV with Cultural Resources in the CR CDS MOA organizational unit. She is making a lateral transfer to the CR CDS MOA Educational Service org unit with no change in salary. She is currently a full time, subject FLSA employee. The effective date is today. At the new agency, she received a cell phone.

In this scenario, you have full security access to both Agencies.

Initiate Workflow to begin the process.



SLIDE 21

State of North Carolina  
Office of the State Controller

## Notes:

Whether you are the Leaving agency or the Receiving agency, you should contact each other to discuss the transfer before processing in BEACON. The Leaving agency takes no action in BEACON (except delimiting items the employee returned). If the Leaving agency does not delimit the items on loan, the Receiving agency can delimit the items (assuming the employee returned them).

If you transfer an employee from one *employee type* to a different *employee type*, you must change the Employee Subgroup. If the employee is going from one *payroll type* to a different *payroll type*, you will only initiate the PCR and when it is approved, you will contact BEST.

When you are processing a Transfer, the Retirement infotype will display. Unless the employee is assigned to a position that entitles him or her to a different retirement program, you do not need to enroll the employee, since the record will transfer from the Leaving agency.

Prior to processing a BEACON to BEACON Transfer, you should review the *Verify Employment Report B0157* to verify employee information.

Also, make sure that the employee has entered all time, released it, the manager has been approved it and that the overnight Time Evaluation has run. Hint: Use PA20 transaction to view the IT0003 for the employee. The PDC recalculation date represents the last time eval has been run.


### Exercise 1.3

- Transfer - Agency to Agency - Promotion

Marsha Sanders is being promoted from Facility Survey Consultant I at the Department of Health and Human Services to a Facility Planner III in Cultural Resources in the CR CDS Capital Projects Unit Org unit.

In this scenario, you only have security access for the Receiving agency.

Initiate Workflow to begin the process.



SLIDE 22

State of North Carolina  
Office of the State Controller


### Notes:

In this exercise, you will process some of the infotypes within the Action, and complete the remaining infotypes in PA30.

### Lesson Review

In this lesson, you learned to describe and enter the applicable data to:

- Transfer an employee from a non-BEACON agency to a BEACON agency
- Transfer an employee within an agency
- Transfer an employee from one BEACON agency to a different BEACON agency



BEACON  
North Carolina  
Office of the State Controller

SLIDE 23

State of North Carolina  
Office of the State Controller

**Notes:**

Course Map

Lesson 1: Transfers

Lesson 2: Leave of Absence

Lesson 3: Additional Actions

Lesson 4: Course Review

SLIDE 24

State of North Carolina  
Office of the State Controller


Notes:



### Lesson Objectives

Upon completion of this lesson, you should be able to:

- Determine the appropriate reason for a LOA (Leave of Absence) Action
- Enter the data to initiate and complete a Leave of Absence for various reasons
- Reinstate an employee from a Leave of Absence

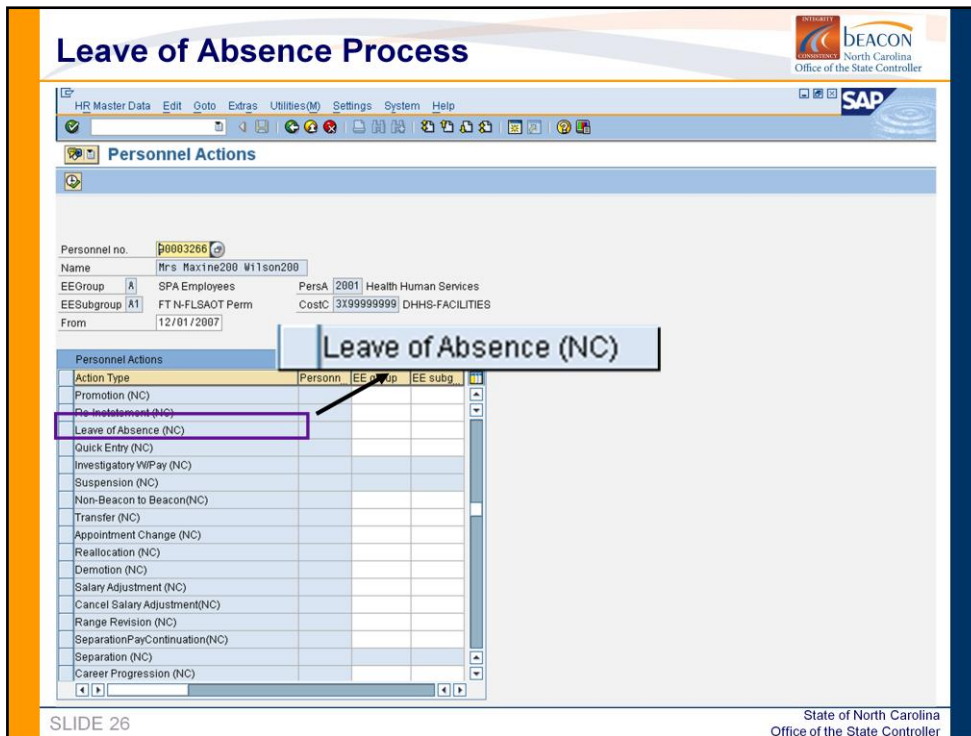


DEACON  
North Carolina  
Office of the State Controller

SLIDE 25

State of North Carolina  
Office of the State Controller

**Notes:**




A **Leave of Absence** occurs when an employee is out of work on paid or unpaid leave. You will observe there is only one LOA Action with no indication about whether it is paid or unpaid (LOA replaces LWOP). To aid in tracking employee leave activities, BEACON has added more LOA reasons than PMIS had, especially for Worker's Compensation (WC) and Military.

### Notes:

#### Reasons associated with the LOA Action

- FMLA
- Family Illness Leave
- Reserve Active Duty (30 days)
- Reserve Active Duty (Lump Sum)
- WC LOA w/supplement
- WC LEO Continuation Pay
- Injury Leave
- S/T Disability 60-Day w/Period
- Short-Term Disability Extended
- Other
- Reserve Active Duty
- Extended Military
- Parental (not FMLA)
- Extended Illness
- Reserve Active Duty (Leave)
- WC 7 Day Waiting Period
- WC Leave of Absence
- WC Correctional Off (Custody)
- Education
- Short-Term Disability Regular
- Short-Term Disability (Lump Sum)
- Emergency Layoff
- Short-Term Disability (Leave)

## Leave of Absence Reasons



**Medical**

- FMLA
- Parental (not FMLA)
- Family Illness Leave
- Extended Illness
- S/T Disability 90 Day w/Period
- Short – Term Disability Regular
- Short – Term Disability Extended
- Short – Term Disability (Lump Sum)
- Short – Term Disability (Leave)

Covered in separate course

**Military**

- Reserve Active Duty (30 days)
- Reserve Active Duty (Leave)
- Reserve Active Duty (Lump Sum)
- Reserve Active Duty
- Extended Military

**Worker's Comp**

- WC 7 Day Waiting Period
- WC LOA w/supplement
- WC Leave of Absence
- WC LEO Continuation Pay
- WC Correctional Off (Custody)

**Miscellaneous**

- Education
- Emergency Layoff
- Other
- Injury leave (has different rules than WC)

SLIDE 27
State of North Carolina  
Office of the State Controller

Although the reasons are shown in SAP in a list, you can mentally group them into four categories as illustrated above.

Short-term disability is not discussed in this course. It is covered in a separate course entitled *PA370 Short-Term Disability*.

### Time Administration and FMLA

The LOA Action is not automatically connected to the time FMLA Workbench. The HR Master Data Maintainer should coordinate with the Time Administrator when a LOA Action is entered. Time Administration is responsible for the **tracking** of FMLA eligibility and number of hours that the employee has used. The Family Medical Leave Workbench (transaction PTFMLA) handles all processes related to the management of FMLA and FIL events.

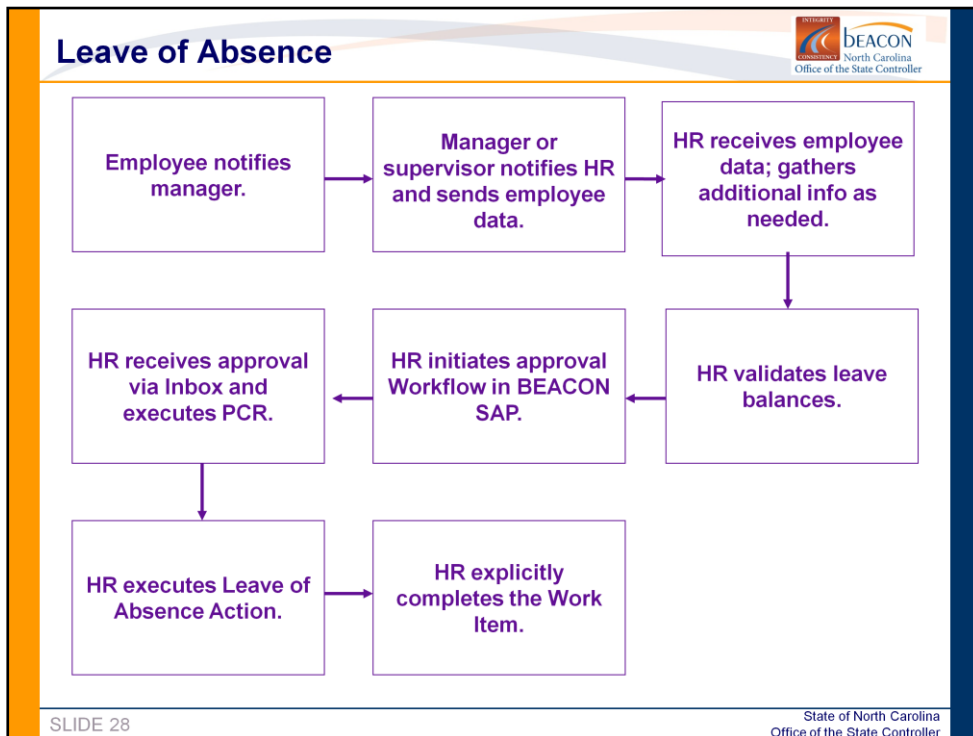
When the FMLA/FIL event is entered by Time, the FMLA Workbench automatically checks an employee's eligibility for FMLA or FIL. Based on OSP policy, an employee's eligibility is related to his or her length of total State Service and hours worked during the previous 12 months.

After an employee has exhausted all of his or her leave entitlement, the FMLA Workbench will also manage his or her eligibility for subsequent leave entitlements.

### Intermittent FMLA

If an employee is absent intermittently on FMLA, you do not execute a LOA Action. In that case, the Time Administrator enters the FMLA event using PTFMLA, and the Leave Administrator tracks absences associated with the FMLA event.


### Notes:

**Notes:**

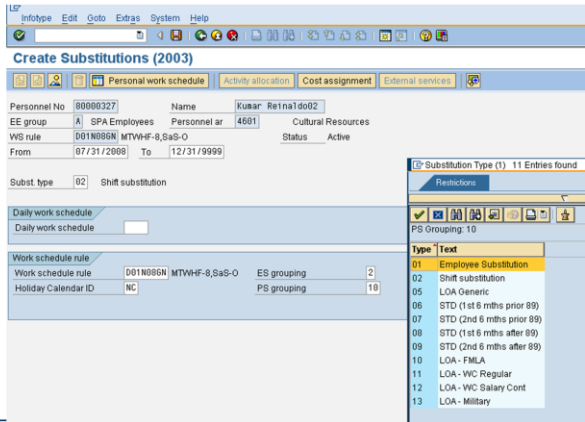
LOA is used to track various activities regarding an employee's leave of absence. As a result, you may need to make more than one entry for the Action (along with the associated reason) when an employee is on LOA (refer to the LOA Processing job aid online at BEACON University). However, instead of having only one entry (as in PMIS), you will now have a complete history of the activity applicable for a particular leave. Comments can be entered on many of the infotypes when entering a LOA. Also, you can run reports based on reasons. Take for example a BEACON employee who is going on an 18-month military leave. At the end of his or her orders the employee volunteers for an additional six months. In BEACON, four LOA entries, with applicable reasons, would be required to record the leave history:

1. LOA Action – reason—either: Reserve Active Duty (Leave) or Reserve Active Duty (Lump Sum)—depending upon whether or not the employee will use leave or will be paid for leave prior to the 30 days.
2. LOA Action - reason: Reserve Active Duty (30 days).
3. LOA Action – reason: Reserve Active Duty (entered on the 31<sup>st</sup> day of duty).
4. LOA Action – reason: Extended Military (entered after the employee's original orders were completed and the employee volunteered for additional duty)--granted for all uniformed service duty that is not covered by military leave with pay as defined by policy for active/inactive duty training, physical exams, and reserve active duty.

## Create Substitutions Infotype



- All employees on leave are to be placed on a substituted work schedule.
- The Create Substitutions infotype is used to facilitate
  - reporting
  - entering time and absences



SLIDE 29

State of North Carolina  
Office of the State Controller

### Notes:

Without exception, all employees who are placed on LOA, must be placed on a substituted work schedule via infotype 2003.

**Date:** The substitution is directly related to the Action, therefore, the **From** date should be the date of the Action, and the **To** date should be 12/31/9999 since the end date of the Action is not usually known at the time of the LOA.

**Substitutions type:** Select the applicable type for the Action (see illustration on slide for list).

**Daily work schedule:** Leave blank.

**Work Schedule Rule:** If the employee is full-time (40 hours a week), enter work schedule D01N08GN into the Work Schedule rule field. The other fields on the infotype will default with the appropriate information for the employee. If the employee is part-time (less than 40 hrs/week), enter a '3' in the ES grouping field. Use the matchcode in the Work schedule rule field to select the appropriate part-time schedule for the employee. If necessary, call BEST for help in determining the correct work schedule.

**Absences**

• Use only when employee exhausts leave while on LOA

• Never put in 12/31/9999 as end date

**Create Absences (2001)**

Personnel No 31084178 Name Daniel Boone-09  
 EE group A SPA Employees Personnel ar 1601 Environment Natural Resources  
 WS rule D01N086N MTWHF-8,SaS-O Status Active  
 Start 12/03/2007 To 12/07/2007

**Absence**

Absence type 9000 Approved Leave  
 Time - ☐ Prev day  
 Absence hours  ☐ Full-day  
 Absence days 0.00  
 Calendar days 0.00  
 Quota used 0.00 Hours

**Advance payment**

Off-cycle reason   
 Payment date   
 Payroll identifier   
 Payroll type

SLIDE 30

State of North Carolina  
Office of the State Controller


**Notes:**

The Absences infotype (2001) indicates the number of hours the employee wants to use for leave, and deducts from the leave quotas as applicable. Enter start and end dates that align with the number of hours the employee wants to be paid for leave. The hours that default are based on the work schedule rule entered on the Substitution infotype combined with the dates you enter on the Absences infotype. Never use 12/31/9999 as the end date. If the employee is not supposed to accrue leave or longevity while on unpaid leave, IT2013 with code 9400 should be entered (see State policy regarding accrual and longevity exceptions for Workers Comp, law enforcement and military leave).

Every employee on any type of leave must be put on substituted actual pay (positive time), — even those who are already on positive pay. After you complete the LOA Action you should review the Planned Working Time infotype (0007) and verify that the employee Time Management Status is 1. If not, use PA30 to copy the infotype and change the status accordingly. However, if you used infotype 2003 appropriately in the Action, it should not be necessary to correct infotype 0007.

Because BEACON is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered.

As long as the employee is receiving pay (leave or work), benefits will continue to be deducted unless the employee has returned the Continuation Form indicating that benefits should be stopped. If not receiving pay, the employee must pay for benefits or discontinue them.


  
 DEACON
   
 North Carolina
   
 Office of the State Controller

## Absences (2001) Example with Holidays

**#1** Enter leave dates up to the holiday on the original LOA

**Change Absences (2001)**

Personnel No. 31005009 Name Daniel Boone  
 EE group A SPA Employees Personnel ar 1601 E  
 WS rule 001N086N MTWTFSS S.O. Stat  
 Start 12/18/2007 To 12/23/2007 Chg. 12/21/2

**Absence**

Absence type 9000 Approved Leave  
 Time - ☐ Prev day  
 Absence hours 32.00 ☒ Full-day  
 Absence days 4.00  
 Calendar days 6.00  
 Quota used 32.00 Hours

**#2** On a PA 30, enter first holiday dates

**Change Absences (2001)**

Personnel No. 31005009 Name Daniel Boone  
 EE group A SPA Employees Personnel ar 1601 E  
 WS rule 001N086N MTWTFSS S.O. Stat  
 Start 12/24/2007 To 12/26/2007 Chg. 12/21/2

**Absence**

Absence type 9300 Holiday Leave  
 Time - ☐ Prev day  
 Absence hours 24.00 ☒ Full-day  
 Absence days 3.00  
 Calendar days 3.00  
 Quota used 24.00 Hours

**#3** On a PA30, enter leave dates up to the next holiday

**Change Absences (2001)**

Personnel No. 31005009 Name Daniel Boone  
 EE group A SPA Employees Personnel ar 1601 E  
 WS rule 001N086N MTWTFSS S.O. Stat  
 Start 12/27/2007 To 12/31/2007 Chg. 12/21/2

**Absence**

Absence type 9000 Approved Leave  
 Time - ☐ Prev day  
 Absence hours 24.00 ☒ Full-day  
 Absence days 3.00  
 Calendar days 5.00  
 Quota used 24.00 Hours

continued

SLIDE 31

State of North Carolina  
Office of the State Controller

### Notes:

If the employee is using leave during a time that includes a holiday, additional 2001 infotypes will be necessary to allow the employee to take holiday leave. The additional 2001 records are created in transaction PA30. For example, assume an employee is going out on military leave on December 18 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there are two holiday periods (12/24 – 12/26 and 1/1/2008). Your entries would be as follows:

1. During the LOA Action, on the Absences (2001) infotype, you will enter the dates for the leave to be exhausted **up to** the holiday period in the Start and To fields:


Start: 12/18/2007      To: 12/23/2007 (32 hours **leave**)

By entering the dates above the system calculates that four working days fall within the date range. The substitution previously created issues an 8 hour workday for the employee; therefore, 32 hours default into the Absence hours field.

2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

Start: 12/24/2007      To: 12/26/2007 (24 hours **holiday**)





## Absences (2001) Example with Holidays (cont.)

### Display Absences (2001)

**#4** On a PA30, enter the holiday leave dates

Personnel No: 31005009    Daniel Boone

EE group: A SPA Employees    Personnel ar: 1601

WVS rule: 001N006N MTWTFSS Sa Su

Start: 01/01/2008    To: 01/01/2008    C g: 12/21/2007

| Absence       |                    |
|---------------|--------------------|
| Absence type  | 9300 Holiday Leave |
| Time          | -                  |
| Absence hours | 8.00               |
| Absence days  | 1.00               |
| Calendar days | 1.00               |
| Quota used    | 8.00 Hours         |

### Copy Absences (2001)

**#5** On a PA30, enter the remaining leave dates

Personnel No: 31005009    Name: Daniel Boone

EE group: A SPA Employees    Personnel ar: 1601

WVS rule: 001N006N MTWTFSS Sa Su

Start: 01/02/2008    To: 01/20/2008

| Absence       |                     |
|---------------|---------------------|
| e type        | 9000 Approved Leave |
| e hours       | 104.00              |
| e days        | 13.00               |
| Calendar days | 19.00               |
| Quota used    | 104.00 Hours        |

SLIDE 32

State of North Carolina  
Office of the State Controller

**Notes:**

3. Create a PA30 to enter the next leave period **up to** the next holiday, infotype 2001, subtype 9000:  
 Start: 12/27/2007    To: 12/31/2007 (24 hours **leave**)
4. Create a PA30 to enter the next holiday period, infotype 2001, subtype 9300:  
 Start: 01/01/2008    To: 01/01/2008 (eight hours **holiday**)
5. Create a PA30 to enter the remaining leave, in this case 104 hours, infotype 2001, subtype 9000  
 Start: 01/02/2008    To: 01/20/2008 (104 hours **leave**)


By entering the data on the Absences infotype as explained in this manner it is not necessary for a separate time sheet to be entered for the employee. If data is not entered on this infotype, the employee is on leave without pay.

**Using leave accrued while out on leave:** If an employee wants to use the time that was accrued while he or she was out on paid leave, you will have to create a new PA30 2001 in order to enter the new leave time. For example: An employee has 160 hours of approved leave. When the employee goes out on LOA, he/she wants to use the 160, plus the hours that are accruing while on leave. In this case, you would enter the 160 hours on infotype 2001 during the Action. After the employee has accrued the additional hours, you would create a PA30 for another 2001 to exhaust the additional leave.



## Instructor Demonstration

- In this demonstration, the Instructor will:
  - Create a FMLA LOA for Janet Thomas



SLIDE 33

State of North Carolina  
Office of the State Controller

### Notes:

**Importance of Monitoring of Tasks:** When you place an employee on LOA, it is very important that you use infotype 0019-Monitoring of Tasks to indicate an Estimated Return to Work date (infotype 0019 is where you track estimated return date; you do not put an end date on the Action). This particular task is required in order for benefits to generate the LOA Continuation letter. That letter is used for the employee to communicate whether or not he or she wants benefits to continue while out on leave. If IT0019 is not completed, the LOA Continuation letter will not print.

It is understood that frequently you do not know the return date or the date may change during the duration of the leave. In that case, it is okay to update this information as needed (a best practice is to follow-up with the employee every 30 days). If the doctor indicates the employee's illness/disability is indefinite, then populate the Est. Return to work date with 12/31/9999. Remember to delimit the infotype if the employee returns earlier than the date of the task. By delimiting the infotype, the task will no longer display on the Date Monitoring report.


### Exercise 2.1

- LOA – FMLA

Janet Thomas is a permanent employee who works at the Department of Commerce. She has the following leave balances: 240 sick and 240 vacation. Effective today, she is going out on FMLA due to her husband's (Bill) serious medical condition. She expects to be out for a total of 12 weeks.

Janet has not indicated that she wishes to use any of her leave for this LOA.

Initiate Workflow to begin the process.



SLIDE 34

State of North Carolina  
Office of the State Controller

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

### Notes:

## Exercise 2.2



- LOA – Worker's Compensation

Patricia Calloway is a permanent employee at Cultural Resources as an Archaeologist II with the following leave balances:

- 200 bonus
- 600 sick leave
- 80 vacation

Patricia was injured on the job while performing her duties and will probably be out of work for a few days. She wants to use 40 hours of vacation during her 7-day waiting period. She is entitled to and wants to receive 2 hours per week of supplemental pay during the six month period.

Initiate Workflow to begin the process.



State of North Carolina  
Office of the State Controller

SLIDE 35

## Notes:

### **When the 7 days are consecutive**

The day the injury occurred is not counted as part of the 7-day waiting period. You may or may not include the weekends (see Weekend section below).

### **When the 7 days are not consecutive**

If an employees takes the 7 days waiting period in non-consecutive days, you will enter several LOA Actions. See the explanation in the *Exercise Guide* on how to process the 7-day waiting period when it is used in non-consecutive days.

### **When to include weekends**

If the doctor's note takes the employee out on Friday and indicates the employee can return on Monday, you would count the weekend as part of the 7-day waiting period. However, if the employee gets hurt early in the week, but is back at work on Friday, then out again on Monday, you would not count the weekend.

### **On the 8<sup>th</sup> day**

If the employee is still out after the 7-day waiting period, you will create a new LOA Action on the 8<sup>th</sup> day using the applicable WC reason.

### Exercise 2.3



- LOA – Military

Kumar Reinaldo is a permanent employee at Cultural Resources. He has the following leave balances:

– 150 hours of vacation – 200 bonus – 120 sick

He received active duty orders for 18 months beginning **May 5th**. He is not eligible for differential pay. He wants to use a combination of vacation and bonus (160 hours) leave prior to starting his 30 days Reserve Active Duty.

In this scenario, the Memorial holiday is included in the time frame for which he wants to use leave. Therefore, you will enter the approved leave on the original LOA **up to** the date of the holiday, and then do a PA30 to enter the holiday and another PA30 to enter the remaining leave dates.

Initiate Workflow to begin the process.



SLIDE 36

State of North Carolina  
Office of the State Controller

### Notes:

**Differential pay:** If an employee is eligible for differential pay it is paid through Accounts Payable (not by BEST Shared Services Payroll). Therefore, you must coordinate with your Accounts Payable Office to ensure that you send them the appropriate paperwork so the employee is paid his or her differential while out on military leave.

**Processing LOA military 30 days when employee also wants to use leave:** According to the State Personnel Manual, you should enter the military 30 days (LOA – reason: 09 – Military Active Duty [30 days] after you enter the hours the employee wants to use for leave (LOA – reason: 10 – Reserve Active Duty [Leave]) .


Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.


## Exercise 2.4

- Reinstatement

Assume today is six months since the effective date that Patricia Calloway (the same employee in 2.2 Exercise) began her LOA. She has fully recovered and is released to return to work. Reinstatement Patricia from LOA.

Initiate Workflow to begin the process.





SLIDE 37
State of North Carolina  
Office of the State Controller

### Notes:

**Date Specifications infotype when you are reinstating LOA employee.** Observe that when you return an employee from LOA, on the Date Specifications infotype (0041), the agency date automatically populates to the date of the Action. If the employee was on LOA without pay, you should adjust that date by the months the employee was out without pay. If the employee does not work half the workdays or get paid half the workdays he or she does not get credit for that month.


### **Reinstate an employee from WC trial rehab working less than 40 hours:**

1. Enter a Reinstatement Action with WC Trial Rehab as the reason on the appropriate effective date.
2. After you complete the Reinstatement Action, use PA30 with the same effective date. Create a Substitutions infotype (2003) putting the employee on Work Schedule D15N04GN (4 hrs) or equivalent. **NOTE:** If the employee is part-time (less than 40 hrs/week), enter a '3' in the ES grouping field. Use the matchcode in the Work schedule rule field to select the appropriate part-time schedule.
3. Use PA30 (same effective date) and use the copy button to revise the annual salary. Example: The employee is working 4 hours and receiving 4 hours WC; the annual salary will change by 50%.
4. The Leave Administrator will need to adjust holiday quotas as required.
5. The employee will enter time worked on a timesheet.

### Lesson Review

In this lesson, you learned to:

- Determine the appropriate reason for a LOA (Leave of Absence) Action
- Enter the data to initiate and complete a Leave of Absence for various reasons
- Reinstatement an employee from a Leave of Absence



DEACON  
North Carolina  
Office of the State Controller

SLIDE 38

State of North Carolina  
Office of the State Controller

**Notes:**

Course Map

Lesson 1: Transfers

Lesson 2: Leave of Absence

Lesson 3: Additional Actions

Lesson 4: Course Review

SLIDE 39


State of North Carolina  
Office of the State Controller

Notes:

### Lesson Objectives

Upon completion of this lesson, you should be able to:

- Describe the method for indicating Work Against Action
- Describe the Dual Employment process
- Describe Career Progression
- Identify the steps in a Reallocation
- Identify additional Actions:
  - Demotion
  - Investigatory w/Pay
  - Suspension
  - Cancel Salary Adjustment



DEACON  
North Carolina  
Office of the State Controller

SLIDE 40

State of North Carolina  
Office of the State Controller

### Notes:



**Personnel Actions – Work Against**

BEACON North Carolina  
Office of the State Controller

SAP

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

**Personnel Actions**

Personnel no. 00003344

Name Mrs. Maxine278 Wilson278

EEGroup K EPA Employees PersA 1301 Administration

EESubgroup EH FT EPA Ex Managerial CostC 1399999999 ADMINISTRATION

From 12/06/2007

| Action Type                   | Personn                             | EE group | EE subg |
|-------------------------------|-------------------------------------|----------|---------|
| New Hire (NC)                 | <input checked="" type="checkbox"/> |          |         |
| Promotion (NC)                | <input checked="" type="checkbox"/> |          |         |
| Re-Instatement (NC)           | <input checked="" type="checkbox"/> |          |         |
| Leave of Absence (NC)         |                                     |          |         |
| Quick Entry (NC)              |                                     |          |         |
| Investigatory W/Pay (NC)      |                                     |          |         |
| Suspension (NC)               |                                     |          |         |
| Non-Beacon to Beacon(NC)      | <input checked="" type="checkbox"/> |          |         |
| Transfer (NC)                 | <input checked="" type="checkbox"/> |          |         |
| Appointment Change (NC)       |                                     |          |         |
| Reallocation (NC)             |                                     |          |         |
| Demotion (NC)                 |                                     |          |         |
| Salary Adjustment (NC)        |                                     |          |         |
| Cancel Salary Adjustment(NC)  |                                     |          |         |
| Range Revision (NC)           |                                     |          |         |
| SeparationPayContinuation(NC) |                                     |          |         |
| Separation (NC)               |                                     |          |         |

SLIDE 41

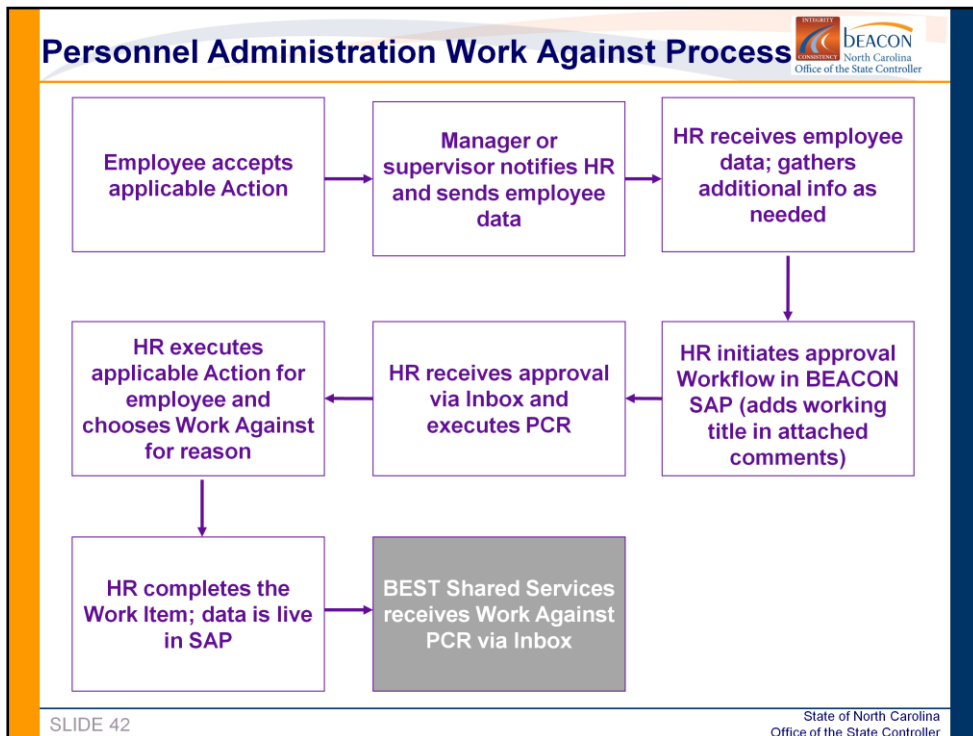
State of North Carolina  
Office of the State Controller

**Notes:**

A **Work Against** can be used during many of the Personnel Administration Actions, including New Hire, Promotion, Reinstatement, Non-BEACON to BEACON, and Transfer. Specific rules for using Work Against are details on the following pages.

**The rules for Work Against are available in the *Thom Wright Work Against* memo from the Office of State Personnel.**

The rules for BEACON Work Against are explained in the above mentioned memo. In the past there have been vast differences in the understanding and application of Work Against. You should review the BEACON rules in depth to ensure that your agency consistently follows the guidelines. You may access the *Thom Wright Work Against* memo online at the OSP website and BEACON University, under HR, PA, Job Aids.

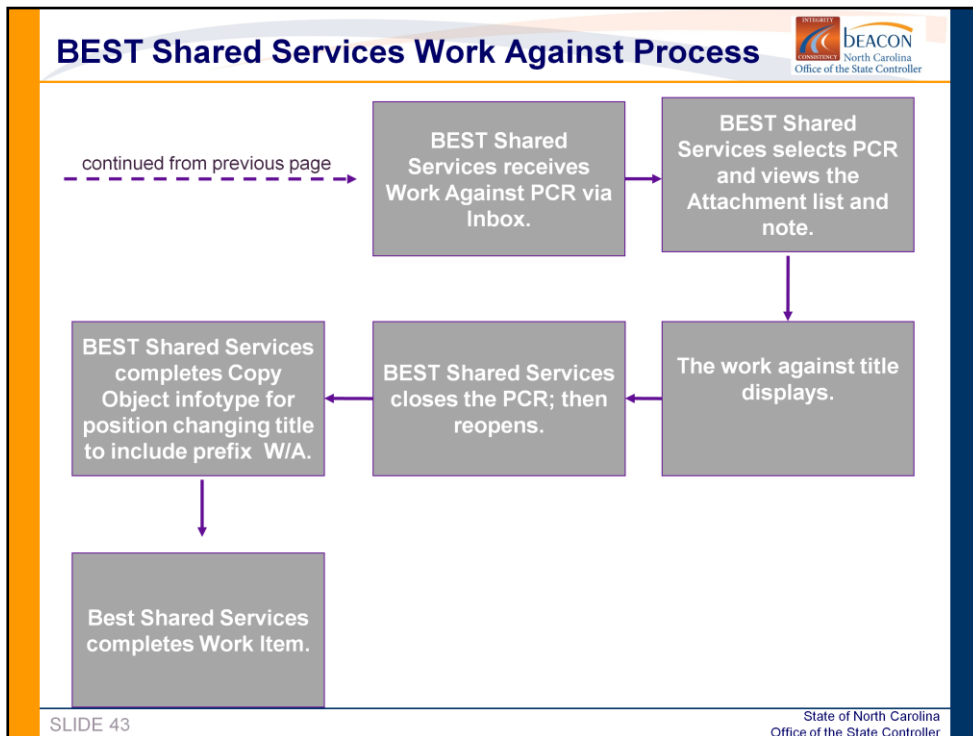
**Notes:**

The various complexities of a BEACON Work Against are outlined and described below and on the following pages.

**The BEACON SAP employee group and subgroup are used to designate the employee type:** Employees are no longer hired into positions that are titled specifically to describe the employee type. For example, there are no longer position titles with the words *trainee*, *temporary*, *intern*, or *probationary*, etc, as part of the title. Positions are named by the Job Classification title by default (Engineer I, Engineer II). The employee subgroup is changed to reflect if the employee is a *trainee*, *probationary*, *time limited*, *grant*, or *temporary* employee.

**The employee and the position must have the same supervisor:** Whether the WA is for one or more employees assigned to a position, the employees and the position must report to the same supervisor. (The employee holds the position and the employee's position reports to the supervisor's position.)

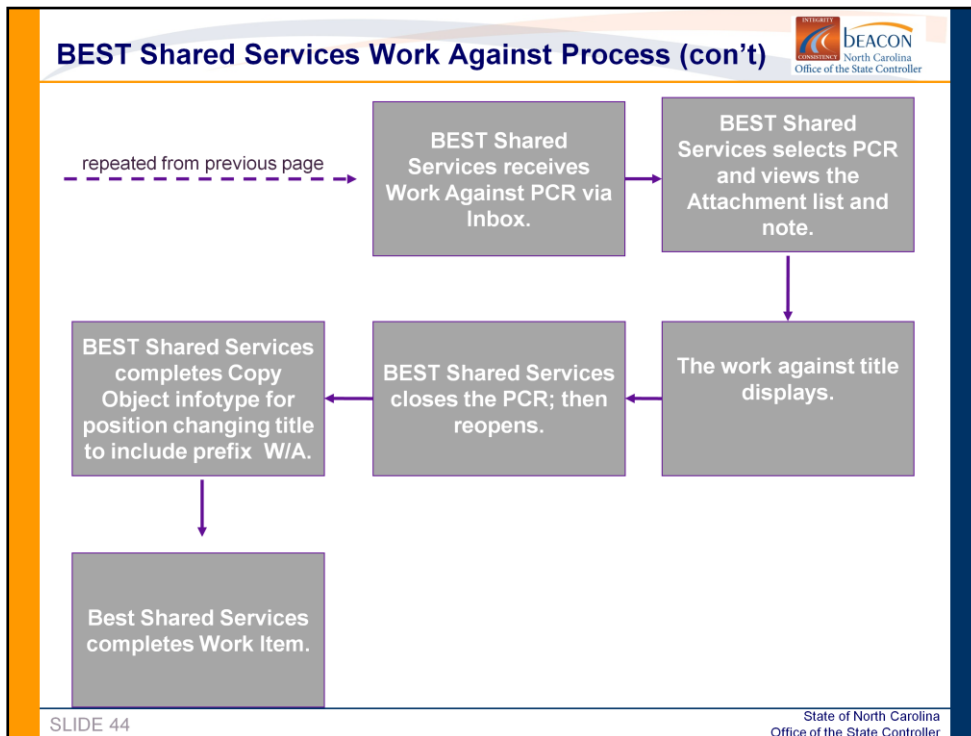
**The employee record (HR Personnel Administration) must be updated in conjunction with the position record (BEST Shared Services):** There is only one PA Workflow for WA, however, that one Workflow involves two separate components: PA (for the employee) and OM (for the position). You must complete the PA (employee) component of the Workflow first. Upon selecting the WA checkbox on the PA Workflow and completing the PA Action, the PCR automatically routes to the BEST Inbox. BEST must make changes to the position object name (title) based on the Work Against Workflow that you submitted.

**Notes:**

**The position title should include the initials W/A as a prefix:** The position object name (title) is changed to include the prefix W/A. HR PA indicates the Work Against title by using the Services for Object button when creating the initial Workflow. BEST Shared Services accesses the Attachments note option to copy the Work Against title. Changing the position with this prefix ensures that reports accurately reflect all of the employees who are assigned to Work Against positions.

The position title field will store the Work Against (W/A) title (employee working title) in work against situations. For example, an Engineer II working against an Engineer III would be handled as follows:


- Job Class Title: Engineer III
- Position Title before W/A Action: Engineer III
- Notes in PA PCR indicate employee is working as an Engineer II against the Engineer III
- Shared Services modifies the Position Title to reflect the W/A Engineer II
- BI reports would reflect:
  - Job Title: Engineer III (does not change)
  - Position Title: W/A Engineer II (this is now the title of the Engineer III position)

**Notes:**

**A bona fide and approved job class must be used:** You cannot use an informal working title as the position title of a Work Against. The position title must be an official job (class) title. For example, Engineer IV is a valid job title. Therefore, an employee can work against an Engineer IV position, but the employee could not work against a “Safety Engineer” position. The title the employee is working against should be entered in the Notes attached to the PCR as previously described.

**The timing of the employee record update and the position update must be coordinated to ensure consistency in data records:** In order for the employee’s record to be correct, you must enter a Work Against with an understanding that BEST Shared Services must also complete information before the Work Against is complete. For example, if you enter a Work Against at 4:30 pm and BEST Shared Services does not receive and process it until late in the afternoon of the following day, the employee’s record has shown an incorrect position title during that time. A best practice is to initiate your Work Against early each morning in order to ensure that BEST Shared Services has enough time to receive and process the necessary position revisions.

## Examples of Correct Work Against Usage



- An Office of State Personnel (OSP) review lowers the employee title and grade (through no fault of the employee).
- Job Sharing - hire two or more employees to work against a bona fide position by following specific rules.

*Continued...*

SLIDE 45
State of North Carolina  
Office of the State Controller


### Notes:

**An OSP review lowers employee title and grade (through no fault of the employee):** After a review by OSP the duties of an employee are determined to be consistent with a title and grade level lower than the one the employee currently holds. Because the lower title and grade level were through no fault of the employee he or she will be allowed to work against the current title and grade, while the position title and grade will be changed to the lower levels. Example: The employee is currently working as an Environmental Program Manager III, at an 86 grade level. After the review, the position is changed to an Environmental Program Manager I position at an 82 grade level. As long as the employee remains in the position he or she will work against the Environmental Program Manager III position, grade level 86. When the employee leaves the position the agency will recruit for the correct position (Environmental Program Manager I, grade 82 in our example).

**Hire two or more employees to work against a bona fide position (example: job sharing):** You can hire two or more employees to work against a position that is a bona fide and approved job title. The salary, appointment type and work schedule for each of the employees may be the same or may be different from each other. However, when hiring two or more employees to work against a position you must follow these additional rules:

- The total cannot exceed one full-time equivalent position.
- The combined salary of the employees cannot exceed the total amount budgeted for the position.
- The classification, supervisor and all other attributes must be the same for all employees working against the position.

**Examples of Correct Work Against Usage (continued)**



- Despite your best recruiting efforts, you have not been able to fill a bona fide position.
- The position for which the employee will work against must be moved to the org unit of the employee's supervisor.

SLIDE 46

State of North Carolina  
Office of the State Controller

**Despite your best recruiting efforts you have not been able to fill a bona fide position:** You have an open position that is a bona fide and approved job title. Despite your best recruiting efforts you have not been able to fill that position. You can hire an employee to work against that position, as long as the person you are hiring and the position both report to the same supervisor.

### **Position moved to report to Supervisor**

If the position to which an employee will be working against does not report to the employee's supervisor, the W/A position will have to be moved. The W/A position must belong to the same org unit as the supervisor's position with the supervisor's position designated as the supervisor of the employee's W/A position.


### **Notes:**

### Exercise 3.1

- Work Against

Transfer Ronald Cyr – Within agency lateral

In this training exercise, you will only create the PCR, you will not process it after it is approved.




SLIDE 47

State of North Carolina  
Office of the State Controller

### Notes:

## Dual Employment



Dual Employment – four scenarios:

1. BEACON to BEACON (ITS to REVENUE)
2. BEACON Employee Performing Dual Employment at Non-BEACON agency (DOT to NCSU)
3. Non-BEACON to BEACON (NCSU to DOT)
4. Non-BEACON to Non-BEACON (NCSU to UNC)

Agency responsibility:

- Parent agency must be aware of benefits consequences for any employee who accepts dual employment
- Parent and Borrowing agency must sign agreement prior to employee accepting dual employment

SLIDE 48
State of North Carolina  
Office of the State Controller

**Notes:**

There are basically four scenarios to use dual employment (see list above).

All dual employment (except Quick Entry) will be processed by BEST Shared Services. The information in this lesson is to provide you with a basic understanding of the processes and policies. When dual employment involves a non-BEACON to BEACON agency, BEACON agency HR will execute a Quick Entry Action to assign the employee to the position. When the dual employment involves a BEACON to BEACON agency, BEST Shared Services will assign the holder (employee) to the position and then create infotype 554 – Hourly Rate per Assignment on the employee.


Because BEACON is an integrated system, time, benefits and payroll are all affected by dual employment (unless the employee is hired into the borrowing agency as a temporary). In BEACON, the hours of both jobs are combined to determine benefits and time. That is why it is important for the Parent and Borrowing agency to sign the agreement **before** the employee begins working dual employment.

The Parent agency must now be aware that if one of its employees works dual employment and becomes eligible for benefits (based on extra hours worked), there will be a cost to the Parent agency. In the past, the number of hours the employee worked at the borrowing agency did not matter.

For details, see the *Dual Employment Process*, *Dual Employment Procedures for Agencies*, and the *Dual Employment Agreement* located online at BEACON University, under HR, PA, Job Aids.



## Dual Employment - Time and Overtime



- Dual Employment employees are changed to positive time.
  - Best Shared Services enters dual employee time
- Overtime as a result of additional work shall be paid. Compensatory time cannot be given.
- Overtime shall be paid by the agency where the overtime occurs.
- The borrowing agency is responsible to work with the parent agency to determine if overtime occurs and to arrive at the appropriate overtime rate according to FLSA.
- Comp time earned prior to dual employment can be taken at either agency.

SLIDE 49
State of North Carolina  
Office of the State Controller

### Notes:

#### **Time**

Employees are changed to positive time when performing Dual Employment. BEST Shared Services will enter the employee's time.

#### **Overtime**

- When overtime occurs as a result of additional work, it shall be paid. Compensatory time cannot be given.
- Overtime shall be paid by the agency where the overtime occurs. This is based on the standards expressed in the Dual Employment Agreement signed by the employee and both agencies.
- It is the responsibility of the Borrowing agency to work with the Parent agency to determine if overtime occurs and to arrive at the appropriate overtime rate according to FLSA. To calculate "premium rate," add hourly rates including all non-discretionary payments (i.e. Shift premium, weekend premium) and divide by standard hours.


#### **Comp Time Agreement of Both Agencies**

Both agencies shall agree that comp time earned prior to the Dual Employment Agreement as well as leave can be taken in either agency, not just the agency where earned.

#### **Ending a Dual Employment**

The agency submits the Separation form to BEST requesting termination of services. The form may be accessed from the BEST website.

## Dual Employment Policies - Miscellaneous



- Payment to the Parent agency – The BEACON system will charge the payment to the appropriate salary account
- Workers' Compensation – entitlements are based only upon the average weekly wages earned in the employment producing the injury. (GS 97-2.)

SLIDE 50


State of North Carolina  
Office of the State Controller

**Notes:**

**Payment to the Parent Agency** - If both agencies are under the BEACON HR/Payroll System, it will no longer be necessary to send a check to the Parent agency. The BEACON system will automatically charge the payment to the appropriate salary account as shown on the approved Dual Employment Form. The employee receives one direct deposit (paycheck).

**Workers' Compensation** - When an employee who holds two separate jobs, is injured in one of them, the employee's Workers' Compensation entitlements are based only upon the average weekly wages earned in the employment producing the injury. (GS 97-2.) Over 40 hours paid - weighted average. Average weekly wage will be manually calculated and provided to the Workers' Compensation specialist.

### CP30



- A CP30 form is only needed in two circumstances:
  - The employee is due pre-SAP wages from dual employment that should have been paid prior to go live
  - The employee is working at an agency that is outside of BEACON (for example, University)

SLIDE 51


State of North Carolina  
Office of the State Controller

### Notes:

As indicated above, there are only two circumstances when a CP30 is needed. When the situation warrants a CP30, it is only sent to BEST by the BEACON agency who received the funds. The CP30 is not sent by the employee nor by the secondary agency. When the parent agency sends the CP30 to BEST, that agency is verifying that funds are available. The parent agency ensures that the CP30 is only sent to BEST one time.; therefore if the agency emailed the CP30, it does not need to then fax the form as well. Sending a CP30 in for an employee more than once increases the likelihood that the employee may be paid more than once.

The employee completes a paper time sheet at the second agency which is signed and approved by the supervisor. The time sheet should have the hourly rate, the position number and contain the words "Dual Employment". The time sheet is sent to BEST who will enter the time for the secondary position. The employee enters time as usual for the primary position.

## Dual Employment Policies - Examples



- Permanent full-time or permanent part-time employee working temporary in another agency
- Permanent part-time employee working permanent part-time in another agency but the total of two part-time jobs adds up to less than 30 hours per week
- Permanent part-time employee working permanent part-time in another agency that adds up to 30 hours or more (not to exceed 40) per week

SLIDE 52
State of North Carolina  
Office of the State Controller

### Notes:

Below are examples of how dual employment affects benefits and time:

**Permanent full-time or permanent part-time employee working temporary in another agency:** A typical dual employment situation involves a permanent full-time or part-time employee in one agency doing temporary work for another agency. The pay is typically a flat amount paid either in a lump sum or paid monthly over the course of employment. The pay may also be an hourly rate. Benefits are paid by the full-time, 30 - hour or more position.

**Permanent part-time employee working permanent part-time in another agency but the total of two part-time jobs adds up to less than 30 hours per week:** Handle as regular dual employment. The benefits involved are leave, NC Flex, 457 Savings Plan. If the employee works as much as 20 hours per week in one agency, the employee is entitled to leave benefits in that agency. The leave accrual and usage will have to be based on the standards expressed in the Dual Employment Agreement signed by the employee and both agencies.

**Permanent part-time employee working permanent part-time in another agency that adds up to 30 hours or more (not to exceed 40) per week:** This type is different from other dual employment. The same approval is required; however, Parent agency must be willing to pay its share of benefits. In this situation the employee would be eligible for full benefits. Both agencies must be willing to pay their pro rata share of retirement, health insurance, etc. If this arrangement cannot be worked out then the additional employment must be as a **temporary** appointment. Parent agency owns the one leave record. Borrowing agency sends paper copy of timesheet to Parent agency so that Parent agency can bill Borrowing agency. If Parent agency is in BEACON the time sheet is forwarded to BEST Shared Services for entry.

**Career Progression - Personnel Action**

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions

Personnel no. **p0003266**

Name **Mrs Maxine200 Wilson200**

EEGroup **A** SPA Employees PersA **2001** Health Human Services

EESubgroup **A1** FT N-FLSAOT Perm CostC **3199999999** DHHS-FACILITIES

From **12/01/2007**

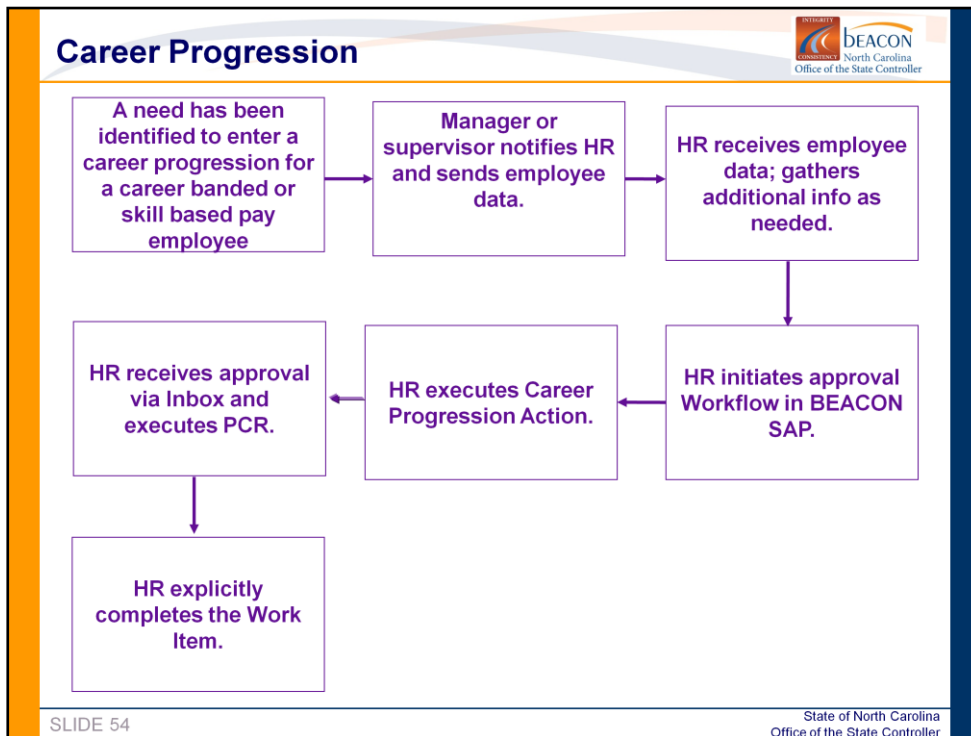
| Action Type                    | Personn | EE group | EE subg |
|--------------------------------|---------|----------|---------|
| Promotion (NC)                 |         |          |         |
| Re-Instatement (NC)            |         |          |         |
| Leave of Absence (NC)          |         |          |         |
| Quick Entry (NC)               |         |          |         |
| Investigatory W/Pay (NC)       |         |          |         |
| Suspension (NC)                |         |          |         |
| Non-Beacon to Beacon(NC)       |         |          |         |
| Transfer (NC)                  |         |          |         |
| Appointment Change (NC)        |         |          |         |
| Reallocation (NC)              |         |          |         |
| Demotion (NC)                  |         |          |         |
| Salary Adjustment (NC)         |         |          |         |
| Cancel Salary Adjustment(NC)   |         |          |         |
| Range Revision (NC)            |         |          |         |
| SeparationPayContinuation(NC)  |         |          |         |
| Separation (NC)                |         |          |         |
| <b>Career Progression (NC)</b> |         |          |         |

SLIDE 53

State of North Carolina  
Office of the State Controller

**Notes:****Reasons associated with the Career Progression Action**

- Grade-Band Transfer
- CP-Comp/Skill
- CP-Labor Market
- CP-Comp Level Change
- Broad Band Level change
- Broad Band Job change
- Broad Band Salary Adjustment

**Notes:**

A Career Progression is used for employees in banded classes and may be granted in conjunction with demonstrated competencies or as justified through the labor market. For example, an employee was hired at a *contributing* level and given certain goals to reach to advance to the *journey* level. After the employee achieves goals his or her manager requests that the position be changed to journey. HR will then execute the Career Progression Action on the employee.

Career Progression is used when pay factors support a salary adjustment within the pay range of the career-banded class and when the employee attains and uses more advanced competencies in same position. Salary eligibility is based on application of all F.A.I.R.\* pay factors. When an employee demonstrates required competencies in a position but is not yet at market index, s/he may receive a Career Progression.

Employees with active warning/disciplinary actions or with overall *below good* or *unsatisfactory* ratings are **not** eligible for a career progression adjustment based on competency assessment.


\* F.A.I.R.

- F Financial Resources
- A Appropriate Market Rate
- I Internal Pay Alignment
- R Required Knowledge, Skills, and Abilities

## Reasons for a Career Progression Action

- Grade Band Transfer
- CP – Comp/Skill
- CP – Labor Market
- CP – Comp Level Change

*Continued...*



DEACON  
State of North Carolina  
Office of the State Controller

SLIDE 55


State of North Carolina  
Office of the State Controller

### Notes:

- **Grade Band Transfer** – employee movement between banded and graded classes.
- **CP-Comp/Skill** - pay factors support a salary increase within the pay range of the employee's career-banded class in conjunction with the employee's attainment and demonstrated use of competencies in the same position. Overall competency level may or may not change. If a salary increase is not granted due to funding issues, and competency level does not change, a Career Progression Action is not processed.
- **CP-Labor Market** – an employee's salary is low in relation to market guidelines applicable to the employee's competencies, and a salary increase is in order. Such a situation could be due to an adjustment in the banded class market rates in conjunction with a labor market study, implementation of a market reference rate with the agency/university, insufficient funding at time of career banding implementation to pay employee at appropriate rate, or removal of an internal equity/pay alignment issue that had prevented an employee from being paid at appropriate competency rate.
- **CP-Comp Level Change** – employee's competency level changes although a salary increase is not granted. Employee's attainment and demonstrated use of competencies results in a higher overall competency level. However, due to funding issues, or because employee's salary already exceeds the appropriate rate, salary is not increased.

**Reasons for Career Progression Actions (continued)**

- Broad Band level Change
- Broad Band Job Change
- Broad Band Salary Adjustment

**BEACON**  
North Carolina  
Office of the State Controller

SLIDE 56

State of North Carolina  
Office of the State Controller

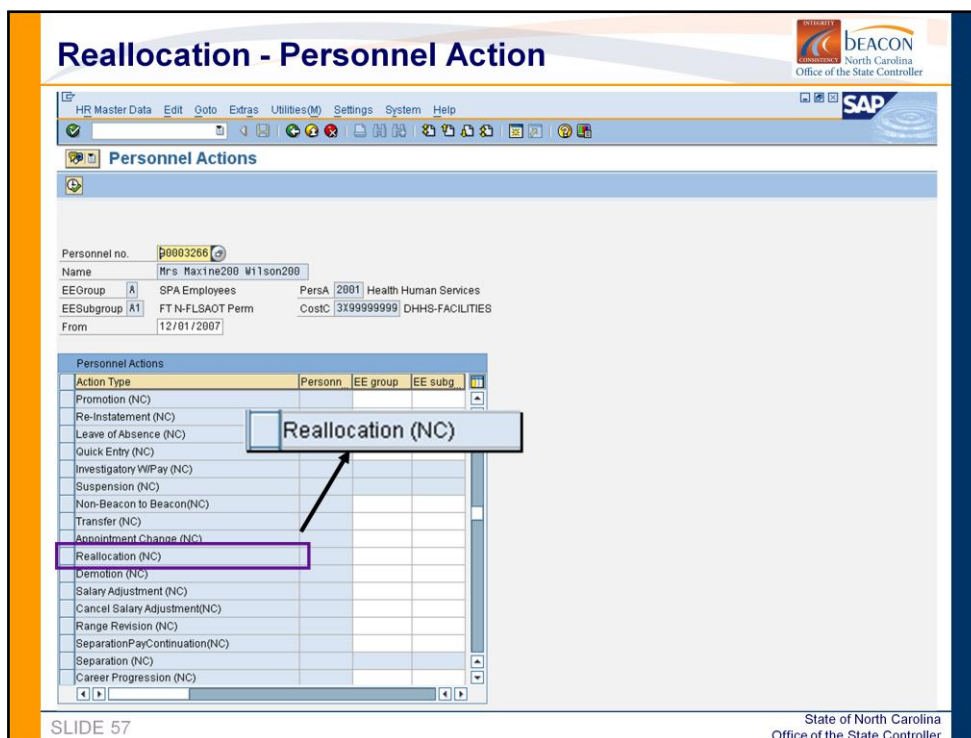
- **Broad Band Level Change** – a change in the level to which an employee is assigned.
- **Broad Band Job Change** – a transfer of an employee from one banded occupational group to another banded occupational group. This may or may not involve position number and salary change. The Object ID (job) must change, therefore, you must coordinate with Organizational Management. If a salary change is involved, the reason for the adjustment and justification for any increase exceeding 10% should be included in the **Comments** section.
- **Broad Band Salary Adjustment** – Career Banding Grade – Band Transfer Adjustment – use of this reason must be approved by the Office of State Personnel /Office of State Budget and Management (OSP/OSBM.)

### DENR and DOT

- In BEACON, the Department of Environment and Natural Resources (DENR) will use a Salary Adjustment Action with In Range-Other Labor Market as the reason. The agencies will not use a Career Progression Action to increase employees pay for skill blocks or Skill Based Pay (SBP).
- The Department of Transportation (DOT) is currently using a Salary Adjustment Action for SBP and will continue doing so with In Range Labor Market as the reason. For more information about SBP for DENR and DOT, contact the Office of State Personnel.

### Notes:





## Notes:

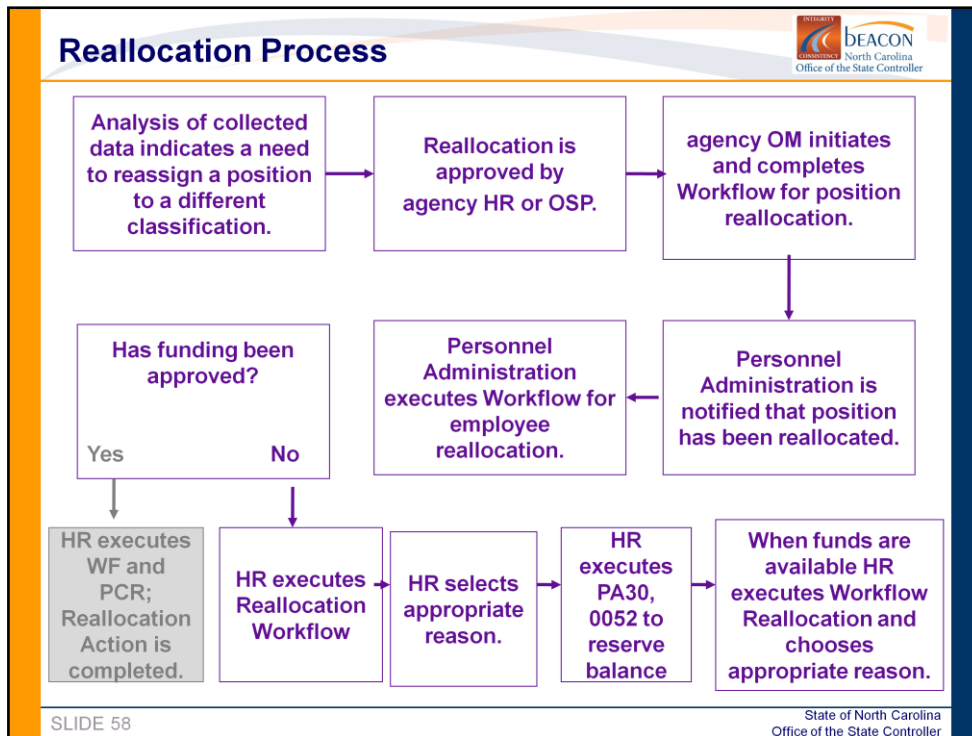
Reallocation is the assignment of a position to a different classification, documented through data collection and analysis according to customary professional procedure and approved by the agency HR or OSP.

For purposes of the Salary Adjustment Fund, the following references are considered reallocations:

- Reallocation – assignment of a graded or banded position to a higher level classification to recognize higher level duties.
- Grade-Band Transfer – initial reallocation of graded positions to banded classes where salary increases are required to recognize higher level duties (see the *Career Banding Salary Administration Policy*).

### **Reasons associated with the Reallocation Action**

- Reallocation Up
- Reallocation Inc – After Effective Date Complete
- Reallocation Inc Partial
- Reallocation Down
- Reallocation Horizontal

**Notes:**


There are two components to a Reallocation: OM and PA. The agency OM must first initiate Workflow to process the change to the position. This must be done before Personnel Administration initiates the Reallocation Workflow for the employee. In the past you processed a 118 and then a 105; now OM must be completed first.

If funding is available HR PA initiates the Reallocation WF Action with the applicable reason, salary changes are made, and the Action is completed. If funding is **not** available HR PA still initiates the Reallocation WF Action and chooses the appropriate reason for the employee. In this case, HR must then execute **PA30** Maintain Master Data (infotype 0052-subtype 0200 Wage Maintenance) to reserve the balance. Enter the amount of the reallocation, not the entire salary.

If later some of the funds become available, you would process a series of Reallocation WF Actions and PA30s to give the funds to the employee, and reduce the balance. For example, assume that you put \$1,500 in reserve for the employee whose annual salary is \$25,000. A few months later \$500 of the funds are released. You would initiate the WF for the Reallocation funds release date, **not** the original Reallocation date. The Reallocation reason would be Real Inc Partial. On IT0008, the salary amount would be the old salary plus the *released* reserve, in this example \$25,500.

The last step is to use PA30 to create infotype 0052-subtype 0200 Wage Maintenance and reduce the reserve balance by the amount released, in our example by \$500.

### Demotion



Office of the State Controller

Reasons for Demotion:

- Personal Conduct – Position
- Gross Inefficiency – Position
- Unsatisfactory Performance – Position
- Personal Conduct – Job Reallocation
- Gross Inefficiency – Job Reallocation
- Unsatisfactory Performance – Job Reallocation
- Personal Conduct – Salary
- Gross Inefficiency – Salary
- Unsatisfactory Performance - Salary

SLIDE 59


State of North Carolina  
Office of the State Controller

### Notes:

**Demotion** is a change in status resulting from assignment to a position assigned a lower salary grade. The action is a demotion if the change in status results from inefficiency in performance or as a disciplinary action. All necessary disciplinary paperwork must be approved prior to the demotion process by the appropriate authorities.

Either skip or delimit the objects on loan depending upon your agency's policy.

### Investigatory w/Pay



Reasons for Investigatory w/Pay

- Investigatory Placement Leave
- Extended

SLIDE 60

State of North Carolina  
Office of the State Controller

### Notes:

#### **Investigatory with Pay**

An employee may be placed on Investigatory Status with Pay to allow the agency adequate time to investigate the validity of the allegations of unsatisfactory performance/unsatisfactory conduct. If allegations are confirmed, the agency will determine what further disciplinary action may be warranted.

When an employee is placed on leave with pay, his/her leave balance is not used. Code 9540 - *Other Manager's Approved Leave* should be entered on the timesheet. Follow agency policy for approvals.


Use the *Monitoring of Tasks (0019)* infotype to remind you about the return date.

Either skip or delimit the objects on loan depending upon your agency's policy.

### Suspension

Reasons for Suspension;

- Conduct
- Unsatisfactory Performance
- Gross Inefficiency



SLIDE 61

State of North Carolina  
Office of the State Controller

### Notes:

#### Suspension

The removal of an employee from work for disciplinary reasons ***without paying*** the employee.


Since it is presumed that the employee will return to work you would use the *Monitoring of Tasks (0019)* infotype to remind you about the return date.

Either skip or delimit the objects on loan depending upon your agency's policy. Follow your agency policy for approvals.

## Cancel Salary Adjustment

Reasons for Cancel Salary Adjustment:

- Cancel Salary Adjustment
- Cancel Acting Pay/Promotion
- Cancel Lead Adjustment
- Cancel In-range Adjustment
- Cancel Geographic Differential
- Cancel Site Differential
- Cancel CGRA
- Cancel Legislative Increase
- Cancel Career Progression
- Cancel LEO Sworn



DEACON  
North Carolina  
Office of the State Controller

SLIDE 62

State of North Carolina  
Office of the State Controller

### Notes:

#### **Cancel Salary Adjustment**

A **Cancel Salary Adjustment** is a decrease in an employee's salary within the employee's current salary range and within the agency where the employee is currently employed.

The same reasons that existed to give an employee a salary adjustment also exist to cancel the adjustment (with the obvious exception that the word *cancel* precedes it). For example, you give an employee an *acting pay* salary adjustment and then decide to cancel the action by selecting *Cancel Acting Pay*.

### Lesson Objectives

- Upon completion of this lesson, you learned to:
  - Describe dual employment process
  - Describe the method for indicating Work Against Action
  - Describe Dual Employment
  - Identify the steps in a Reallocation
  - Identify additional Actions:
    - Demotion
    - Investigatory w/Pay
    - Suspension
    - Cancel Salary Adjustment

SLIDE 63

State of North Carolina  
Office of the State Controller

### Notes:

Course Map

Lesson 1: Transfers

Lesson 2: Leave of Absence

Lesson 3: Additional Actions

Lesson 4: Course Review

SLIDE 64

State of North Carolina  
Office of the State Controller

Notes:



### Course Review

In this course, you learned to:

- Hire an employee from a non-BEACON agency
- Transfer an employee within a BEACON agency or to a different BEACON agency
- Describe the various reasons for a Leave of Absence and determine when each is applicable to use
- Execute a Leave of Absence
- Reinstate an employee from Leave of Absence
- Describe additional Actions associated with an employee


SLIDE 65

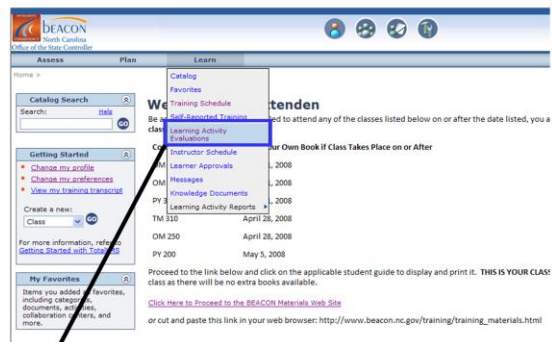
State of North Carolina  
Office of the State Controller

**Notes:**

## Level 1 – Course Evaluation

Level 1 evaluations are used by the BEACON Training Team to ensure students are experiencing their instruction in an environment and method that is conducive to learning.





SLIDE 66

State of North Carolina  
Office of the State Controller

### Level 1 Evaluations


The Level 1 evaluation for 100 and 200 level classes is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.

### Notes:

## Next Steps

- Monitor BEACON communication
  - BEST Shared Services web site (especially the Updates tab)
  - URL: <http://www.ncosc.net/BEST/>
- Review conceptual materials
- Access BEACON Help
  - Access from an SAP transaction
  - URL: <http://help.mybeacon.nc.gov/beaconhelp>
- Practice what you've learned
  - URL: <https://mybeacon.nc.gov>
  - Client 899
  - Use your current NCID user name and password



SLIDE 67

State of North Carolina  
Office of the State Controller

## Notes:

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

### **Want to practice what you have learned from your desk?**

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

### **Need transactional assistance after go live?**

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.



beacon  
North Carolina  
Office of the State Controller

# CONGRATULATIONS



You have completed the course

Please complete your course evaluation!

SLIDE 68

State of North Carolina  
Office of the State Controller

Notes: